

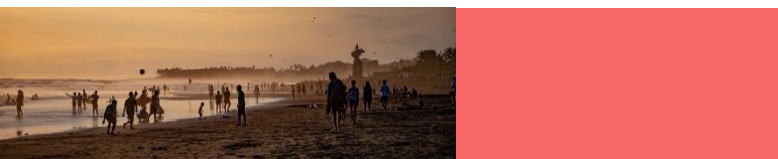
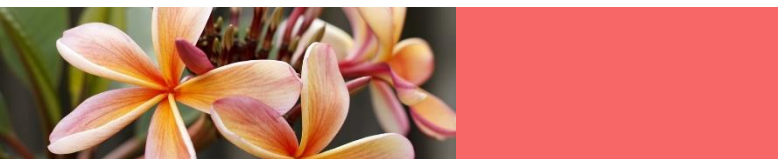


Taipei Airfreight Forwarders & Logistics Association of Taiwan (TAFLA)

Country Report

FAPAA Executive Council Meeting Jun 08 , 2023

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PART 1_ Air Cargo Forwarders and Logistics Outlook in Taiwan



PART 2_ International Airport Cargos Statistics

Part.1

Recent Air Cargos Forwarders and Logistics Conditions in Taiwan



After going through the epidemic for the past 3 years, International Trading have reunited and rebuilt the supply chain rapidly.

Increasing demand for e-commerce both internationally and domestically have resulted in the increase of express cargo customs declaration files year by year.

Through signs of gradual opening of airports between Taiwan and China, we anticipate that air cargo volume will steady increase.



Air cargo export market volume has been soft in 1st half of 2023 and this trend may continue through Q3, causing airline rates to decline to lower level.

Resource: TAFLA association journal, Taoyuan International Airport, Pixabay

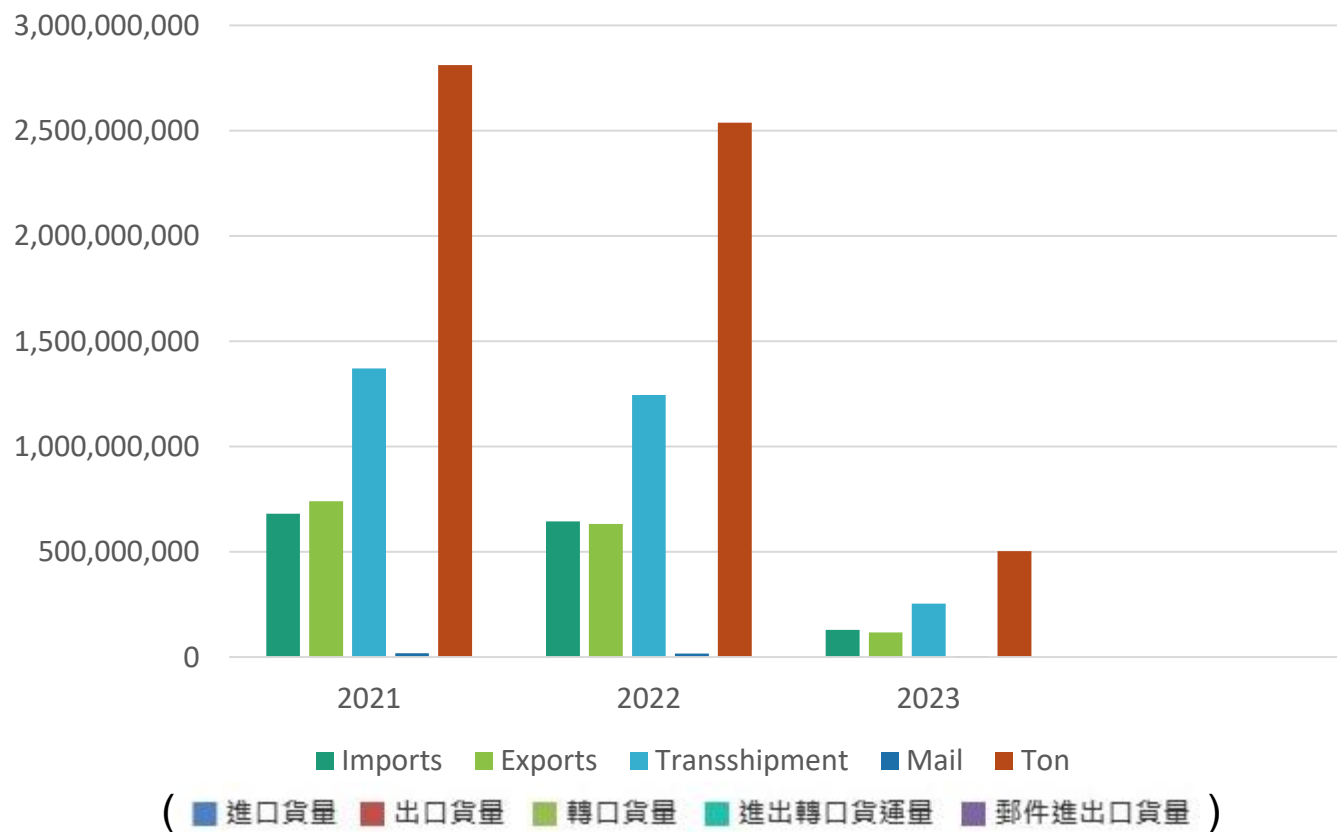


TAFLA Chairman_
Steven Huang



Part.1

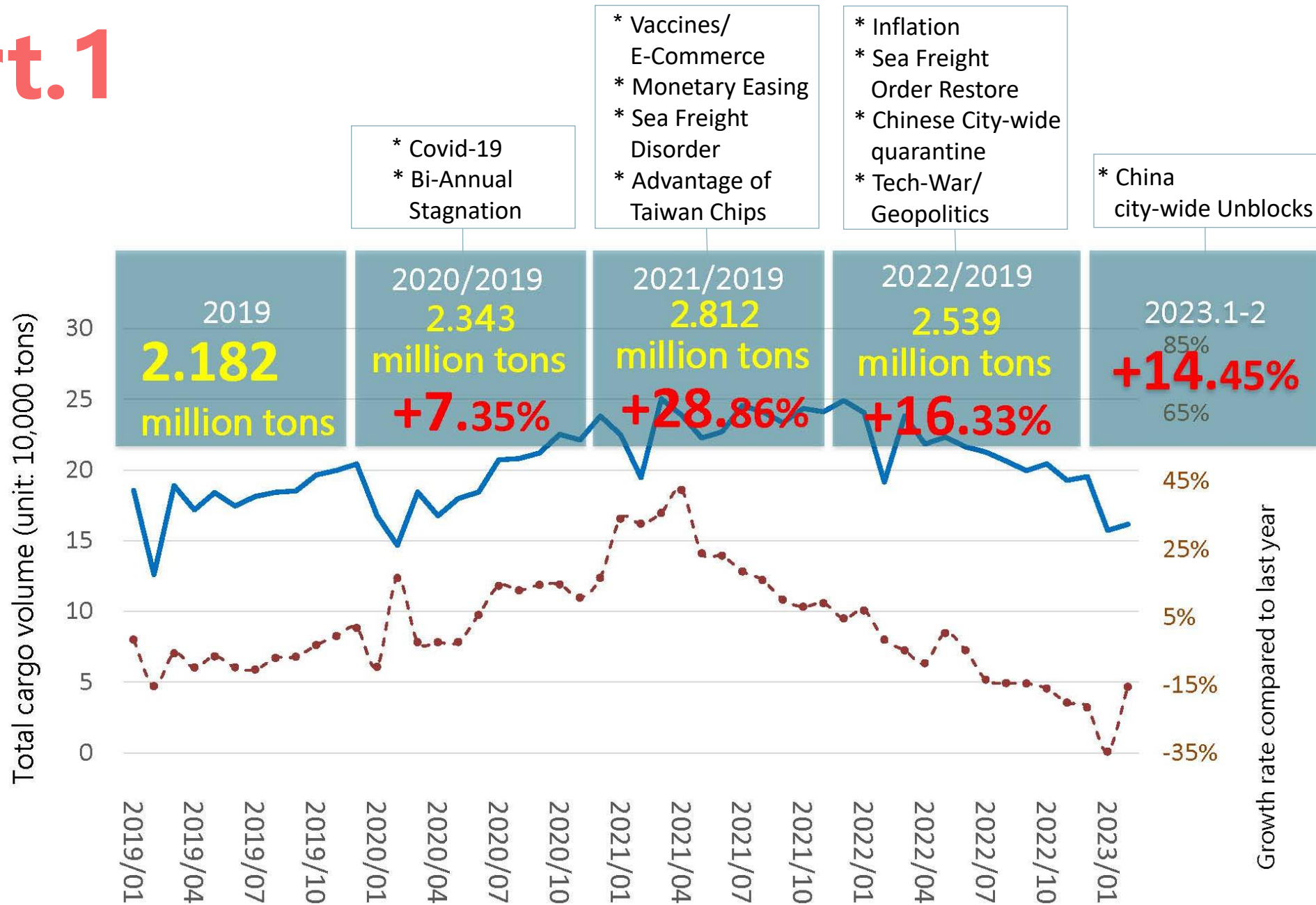
Taiwan's air cargo volume performance 2021~2023



	2021	2022	2023
Imports	681,164,799	644,240,101	128,693,631
Exports	740,979,335	633,192,598	117,461,689
Transshipment	1,371,440,050	1,244,969,862	254,294,948
Mail	18,481,155	16,365,749	3,372,054
Ton	2,812,065,339	2,538,768,310	503,822,322

Part.1

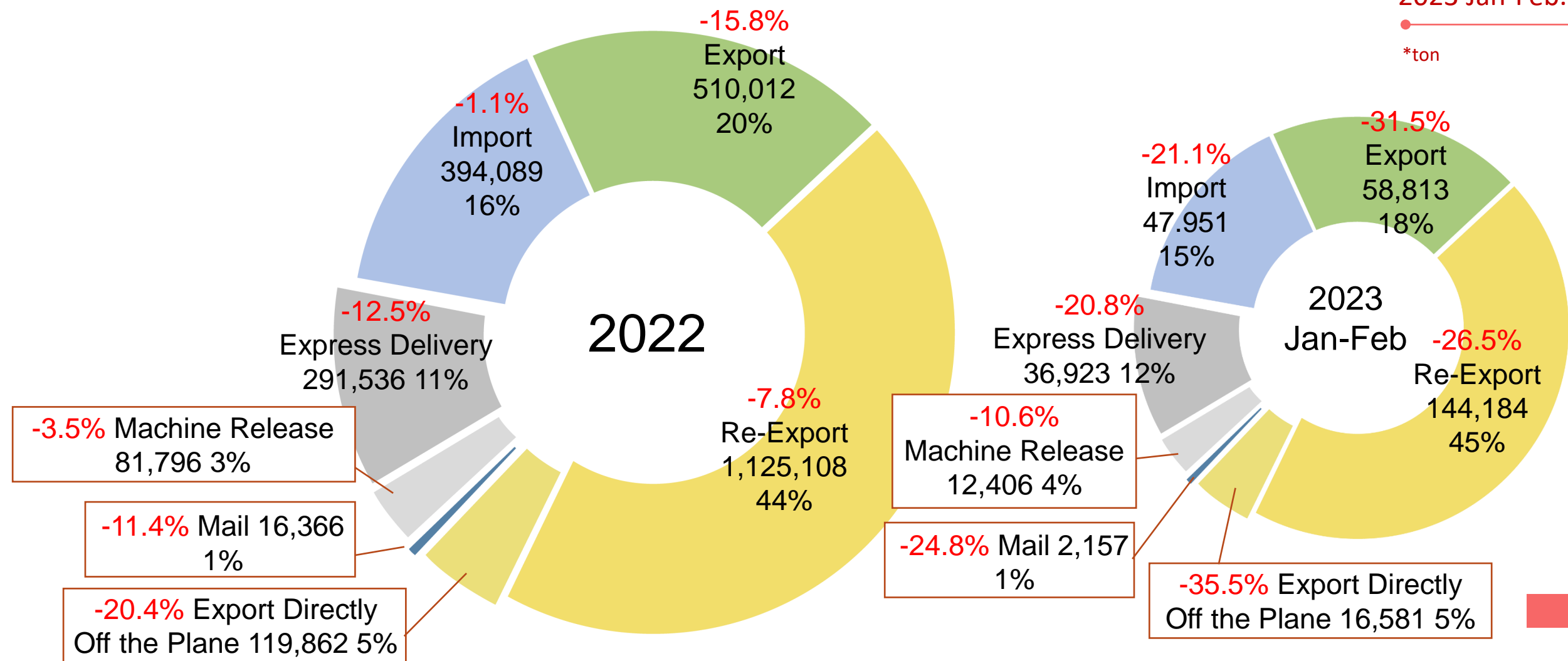
Taiwan's air cargo volume trend charts from 2019



Part.1

Taiwan's air cargo volume
Statistics
from 2022 to
2023 Jan-Feb.

*ton



Part.1

Taiwan's monthly exports trade values and growth rates.

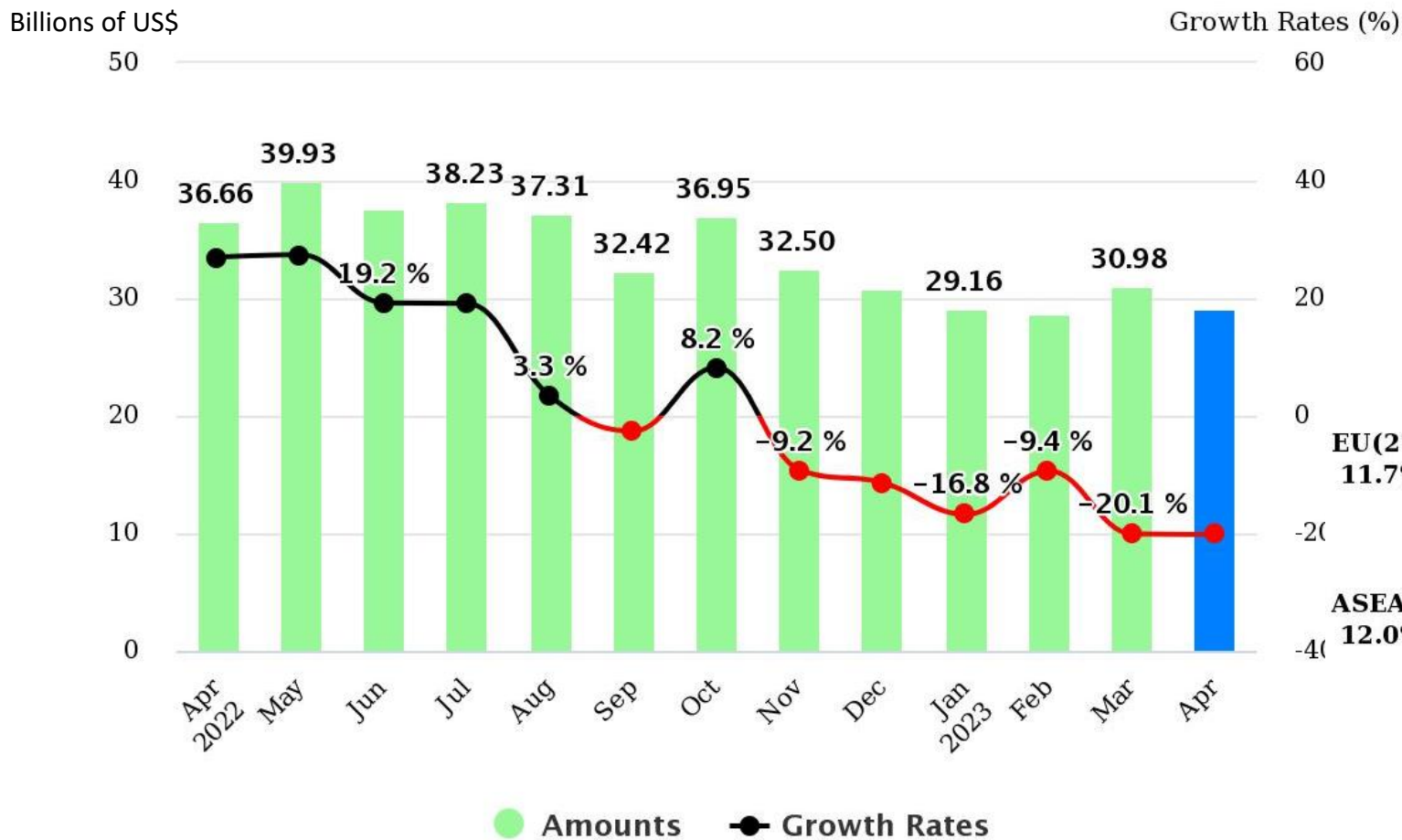


Major Exports by Destinations

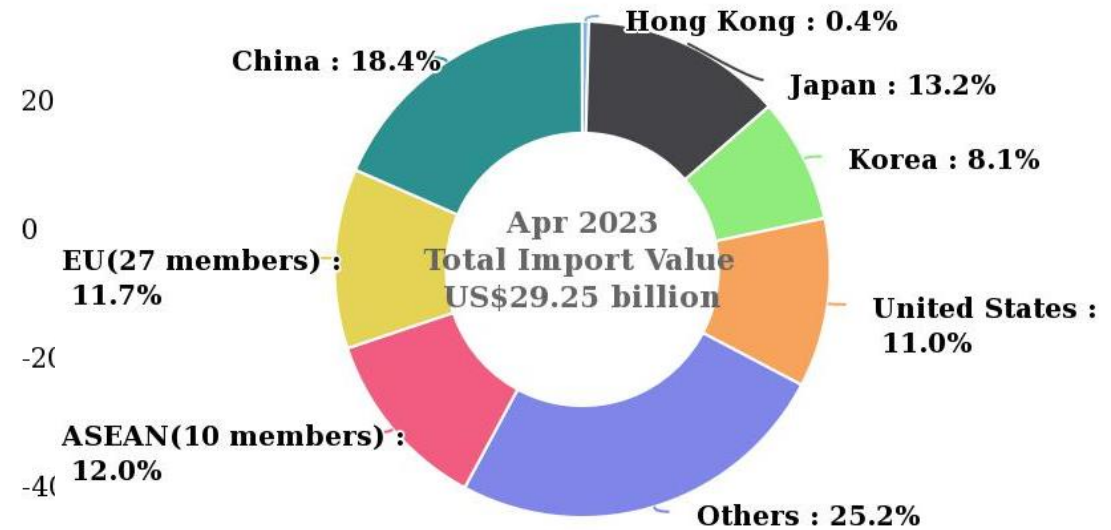


Part.1

Taiwan's monthly imports trade values and growth rates.



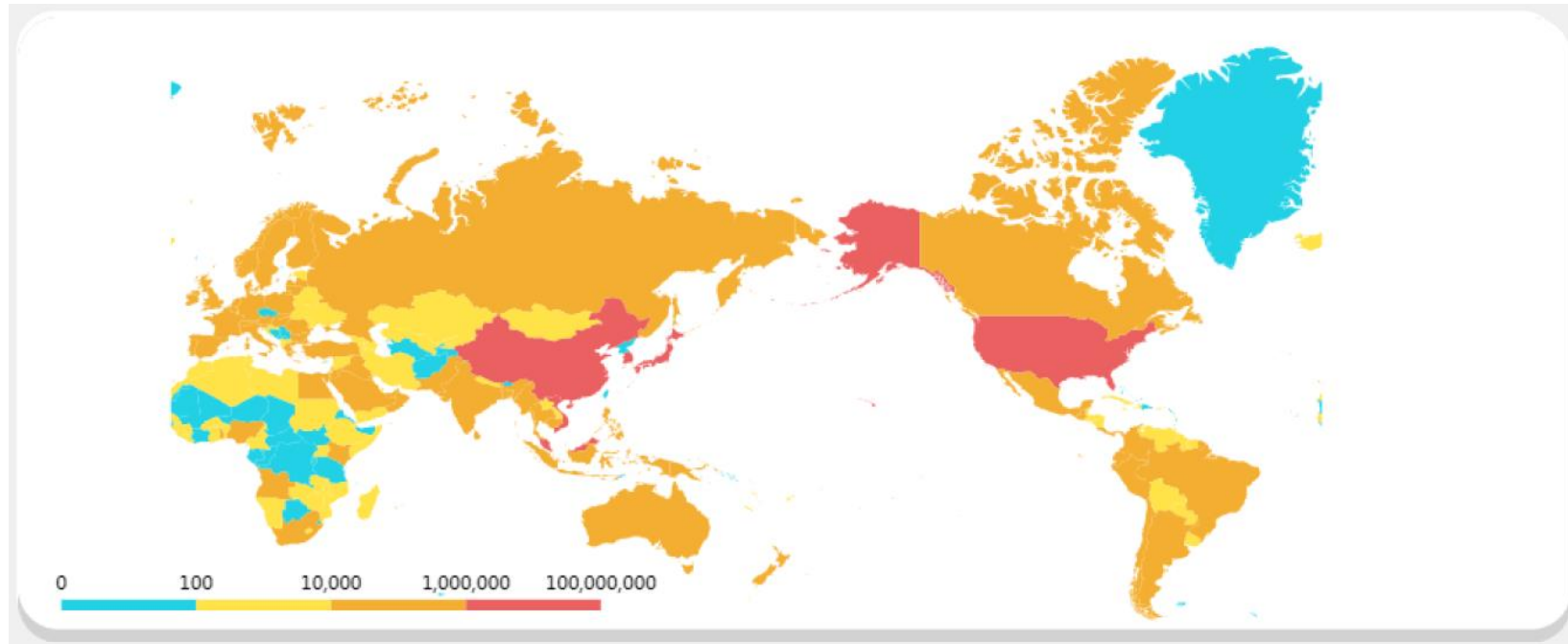
Major Imports by Destinations



Part.1

Taiwan's Industries exports performance

2022 Sum of Taiwan Exports (ten thousand U.S. dollars)

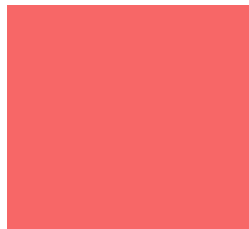


Variation of Taiwan's Important Trading Partnership Exports Value

	China	U.S.	Japan	South Korea	Hong Kong	Singapore	Germany
2021	2,345,648 △	1,513,631 △	580,807 △	499,969 △	403,687 △	663,472 △	213,390 △
2022	-476,824 ▽	936,998 △	441,119 △	204,148 △	180,722 △	380,513 △	64,086 △

International Airport Cargos Statistics

Part.2



*Cargo:
loaded and unloaded
freight and mail in
metric tonnes

**includes
transit freight

Cargo (Metric Tonnes)*						
2022	2021	2019	AIRPORT	2022	% change vs 2021	% change vs 2019
1	1	1	HONG KONG SAR, HK (HKG)	4,199,196	-16.4	-12.7
2	2	2	MEMPHIS TN, US (MEM)	4,042,679	-9.8	-6.5
3	4	6	ANCHORAGE AK, US (ANC**)	3,461,603	-4.3	26.1
4	3	3	SHANGHAI, CN (PVG)	3,117,216	-21.7	-14.2
5	6	4	LOUISVILLE KY, US (SDF)	3,067,234	0.5	9.9
6	5	5	INCHEON, KR (ICN)	2,945,855	-11.5	6.6
7	7	9	TAIPEI, TW (TPE)	2,538,768	-9.7	16.3
8	12	12	MIAMI FL, US (MIA)	2,499,837	-0.8	19.5
9	8	13	LOS ANGELES CA, US (LAX)	2,489,854	-7.6	19.0
10	9	10	TOKYO, JP (NRT)	2,399,298	-9.3	14.0

*International freight
loaded and unloaded
in metric tonnes

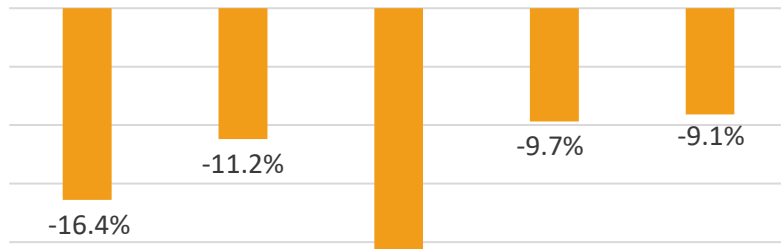
**includes
transit freight

Intl Freight (Metric Tonnes)*						
2022	2021	2019	AIRPORT	2022	% change vs 2021	% change vs 2019
1	1	1	HONG KONG SAR, HK (HKG)	4,169,397	-16.4	-11.4
2	2	3	INCHEON, KR (ICN)	2,907,420	-11.2	9.1
3	3	2	SHANGHAI, CN (PVG)	2,568,355	-20.9	-9.1
4	4	6	TAIPEI, TW (TPE)	2,522,403	-9.7	16.5
5	5	7	TOKYO, JP (NRT)	2,356,119	-9.1	15.5
6	7	10	ANCHORAGE AK, US (ANC**)	2,349,911	-5.6	21.0
7	6	5	DOHA, QA (DOH)	2,300,860	-11.1	5.9
8	10	12	MIAMI FL, US (MIA)	2,031,576	-0.4	19.1
9	9	9	FRANKFURT, DE (FRA)	1,890,026	-13.9	-3.6
10	11	8	SINGAPORE, SG (SIN)	1,853,000	-4.8	-8.0

Part.2

International Freight 2021 vs 2022

2021 vs 2022 Growth Rate



Freight Volume
(metric tonnes)

6,000,000

5,000,000

4,000,000

3,000,000

2,000,000

1,000,000

0

HONG KONG
SAR, HK (HKG)

INCHEON, KR
(ICN)

SHANGHAI, CN
(PVG)

TAIPEI, TW
(TPE)

TOKYO, JP
(NRT)

■ 2022 ■ 2021

International Freight 2021 vs 2022

International Freight 2021 vs 2022

2022	2021	AIRPORT	2022	2021	% change vs 2021
1	1 –	HONG KONG SAR, HK (HKG)	4,169,397	4,986,256	-16.4
2	3 △	INCHEON, KR (ICN)	2,907,420	3,273,004	-11.2
3	2 ▽	SHANGHAI, CN (PVG)	2,568,355	3,245,548	-20.9
4	4 –	TAIPEI, TW (TPE)	2,522,403	2,793,584	-9.7
5	7 △	TOKYO, JP (NRT)	2,356,119	2,591,255	-9.1

Air cargo
demand started
the year on a
weak note

Part.2

2022/2019

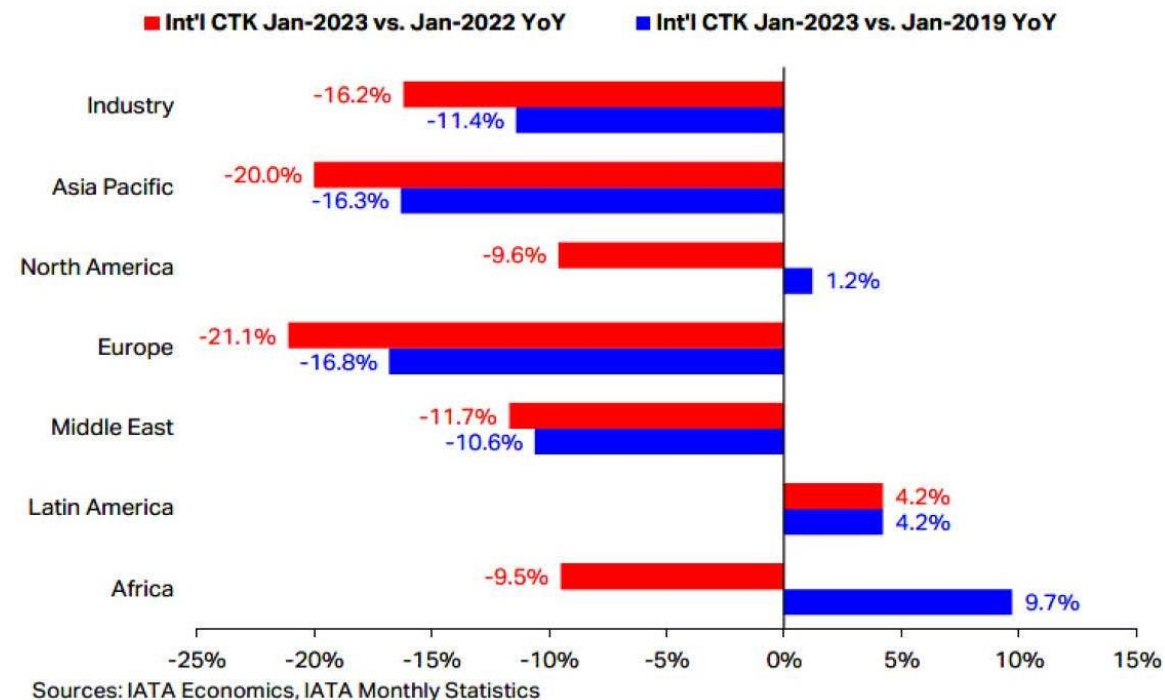
-1.6%

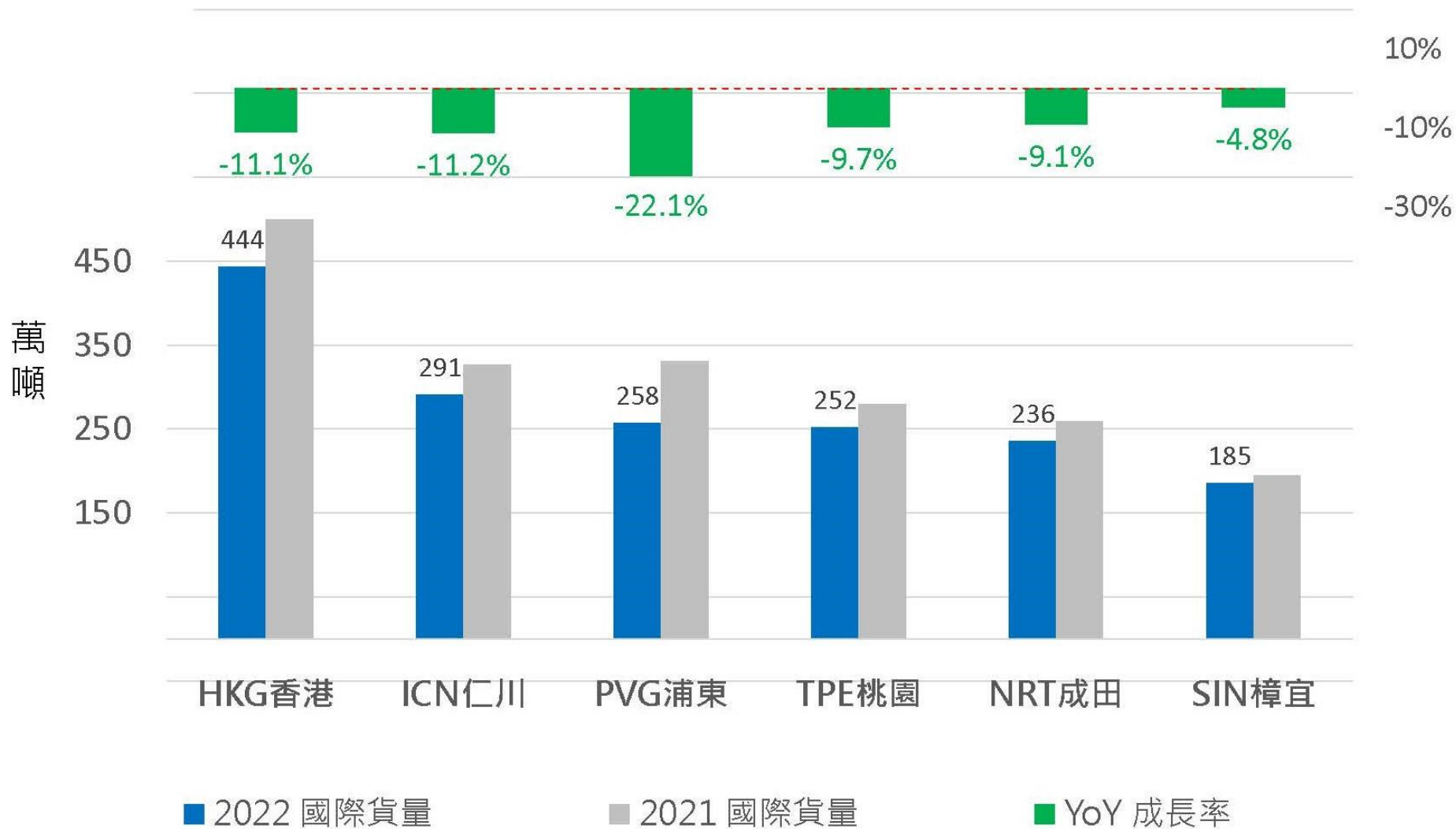
Over the course of 2022, global air cargo demand was 8.0% below the outstanding performance in 2021 but still tracked close to the pre-COVID level in 2019, with only a 1.6% contraction.

2023.1/2019.1

-11.4%

Chart 8 YoY growth in international CTKs by region





International trading
development
In the future

Part.2

Geopolitical Development

The technological competition between the United States and China and the ongoing war between Russia and Ukraine have added to the uncertainty of the global economy and trade.

China's Economic Outlook

Epidemic policy has changed, and the epidemic spread rapidly. The current economy is facing the pressure of "demand contraction, supply shock, and weakening expectations".

Interests Rising

Through Out Countries

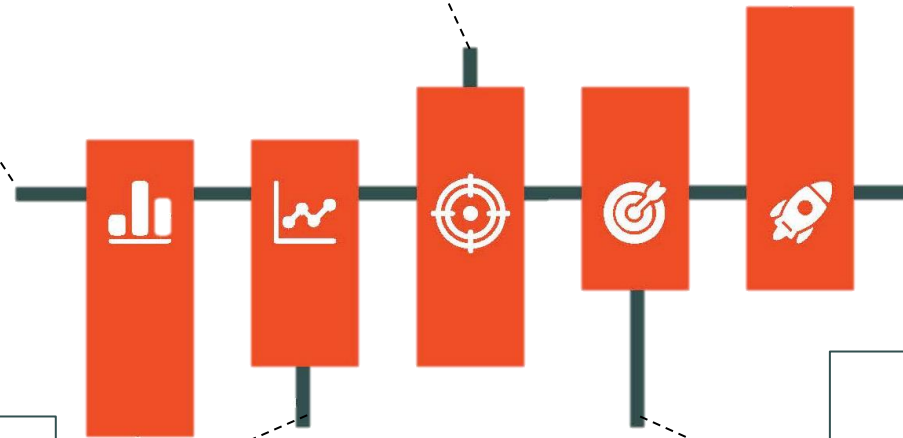
Central banks such as Europe and the United States has been raising interests sharply, and countries with high debt ratios may be in a worse situation which affects global financial stability.

Highly Inflationary Pressure

Major countries adopt tightening monetary policies to retard the current inflation, affect people's livelihood expenditures, and drag down the global economy.

Extreme Weather Risk

The world is suffering from extreme weather, which impacts the food supply chain. Countries and enterprises should accelerate green transformation to solve climate change.





Thank You!